

## Manage your Taxes

### Part of the 2010 Seminar Series

Hosted by Ron Cioffi, CFP®, CRPC®, CFS, AAMS®

Ameriprise Financial

When: Wednesday, January 20<sup>th</sup> 2010 @ 6:30 pm  
Where: Steinbacher and Stahl Resource Center  
401 Washington Blvd, Williamsport, PA 17701

Guest Speaker: Nancy Montanye, CPA, CFP®, CSEP

#### Tax Planning for Individuals: Current Developments

New Laws: American Recovery & Reinvestment Act - 2/17/2009  
Worker, Homeownership, and Business Assistance Act of 2009 - 11/6/2009

2009 only: New vehicle sales tax deduction

2009 and 2010:

- First Time Homebuyers tax credit
- American Opportunity tax credit
- 529 Plans
- Making Work Pay credit
- Unemployment compensation exclusion
- Energy credit
- Capital gains tax rates
- Mileage rates

2010:

- Roth IRA conversions
- Series E Bonds final maturity

Other:

- Substantiation Rules– Charitable Contributions; Travel
- Kiddie Tax
- Worthless Stock
- Pa Tax Amnesty Program
- Estate and Gift Tax

*Seating is limited, so reserve your spot by calling (570) 322-1002. Guests are welcome!*